

# EVALUATING YOURSELF

The Performance and Staff Development Program is designed to:

- Encourage regular, constructive review and discussion between you and your supervisor on your performance and your progress at achieving the goals and expectations of the job.
- Improve your understanding of desired results so you may better guide your efforts.
- Promote effective job performance by recognizing and supporting your strengths and achievements.
- Enhance your professional growth and development by identifying areas for change (in performance, approach, skills, or knowledge) and helping you to achieve it
- Realign future goals, expectations, and responsibilities with the objectives of the department/unit

| DIRECTIONS   | HELPFUL TIPS  |
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| <b>1. Set a Date</b>   |   |
| <input type="checkbox"/> Set a performance review date with your supervisor so it leaves you with enough time to prepare. <sup>1</sup>   | <sup>1</sup> If you do not hear from your supervisor, be proactive and request a date.  |
| <b>2. Collect and review all performance documentation for the current appraisal cycle</b>   |   |
| <p>This may include:</p> <input type="checkbox"/> a copy of your last Performance Evaluation<br><input type="checkbox"/> your own documentation notes or status reports <sup>2</sup><br><input type="checkbox"/> commendations and other compliments received<br><input type="checkbox"/> written summaries of discussions about performance   | <sup>2</sup> Keeping notes of specific actions and tracking results & how much time they took throughout the year will make the performance review less time consuming and difficult. Now you can enter that information online all year. (login through the Bridge)                                |
| <b>3. Fill in the Self Evaluation form (Login to the Bridge)</b>   |   |
| <p><b>A-1 Annual Statement of Achievements and Results</b></p> <input type="checkbox"/> List the work (responsibilities/duties, or projects) assigned to you for the current cycle as well as any subsequent changes <sup>3</sup> in the first column.<br><input type="checkbox"/> Describe the results – if appropriate quantify them by including how many, how often, etc. <sup>4</sup> .<br><input type="checkbox"/> Assess how successful they were in comparison to the expectations, standards, or goals that were set. Be as objective, honest and realistic as possible. Note what ratio of time was required to achieve the result.<br><input type="checkbox"/> Include any additional achievements, courses taken, etc. | <p><sup>3</sup> Start by entering the items from last year's <i>Performance Plan</i> (sec C-3) here.</p> <p><sup>4</sup> Remember this is about what you've achieved - the outcomes and consequences not how you achieved it. Save that for the examples in <i>Part B – Performance Factors</i></p> |
| <p><b>A-2 Points to Discuss with your Supervisor</b></p> <input type="checkbox"/> Use the points to organize your thoughts and reflect on the past year. Consider the areas you have done well, areas you need to improve, your ambitions, what you need from others to help you do your best in your job, and suggestions for <u>organizational improvement etc.</u>  | <p>This section allows your supervisor to see the job from your perspective, so try to answer the questions the best you can. This is also a good chance to provide feedback on your supervisor.</p>  |
| <p><b>B Performance Factors</b></p> <input type="checkbox"/> For each row under the performance factors, that are relevant to your position, check the box where the descriptor most closely explains your performance over the entire period. If a row is deemed not relevant, leave it blank.  | <p><sup>5</sup> Try to be sincere, this is not the time to exaggerate, or be shy and humble. If it helps, focus on the descriptors and ignore the rating titles and numbers. If you can make a strong case for it check the box.</p>  |

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| <ul style="list-style-type: none"> <li><input type="checkbox"/> Start with the descriptor in the middle— „<i>meets expectations</i>“, if your performance is a bit more than that move to the descriptor on the right. If the opposite is true move to the descriptor on the left.</li> <li><input type="checkbox"/> <u>Make sure you enter specific actions or cases to support your ratings.</u> Your supervisor may not be aware of all you do.</li> <li><input type="checkbox"/> The weight column is used to show the importance of the performance attribute to your job. Where 0=none, 1=Low, 2=Medium, and 3=High. If all factors are of equal significance, leave the default of 3.</li> </ul>  | <p>Check both boxes if you believe your performance falls in the middle of two descriptors e.g. positive changes were made towards the end of the period.</p> |
| <p><b>4. Submit the Self Evaluation form to your Supervisor.</b></p>   |   |
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Please complete and submit the self-evaluation to your Supervisor by May 1<sup>st</sup>. Once this deadline is reached, your self-evaluation will be viewable by the Supervisor whether you have submitted it or not.</li> </ul>   |   |
| <p><b>5. The Performance Review Meeting</b></p>  |   |
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Go through each section of the forms together. Discuss your respective responses and assessments in an open and positive manner.</li> <li><input type="checkbox"/> Where differences exist, try to understand and resolve them. Come to a mutual understanding as much as possible, because the goal is for you to succeed.</li> <li><input type="checkbox"/> If expectations are not met, look at specific examples with a problem-solving mindset. Focus on how things can improve in the future. Try to provide you own ideas and solutions. Stay away from blaming others and making excuses. Be honest and take responsibility.</li> <li><input type="checkbox"/> Listen and take notes. Reflect back to your supervisor your understanding of what they said.</li> <li><input type="checkbox"/> Discuss your specific development and training needs i.e. what is needed to do your job more efficiently or progress? Participate fully in setting goals, expectations, and standards, as you are more likely to successfully achieve a development or performance plan in which you feel some degree of ownership.</li> </ul>   |   |
| <p><b>6. Conclude the Performance and Development Evaluation</b></p>   |   |
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Your supervisor will update the „<i>Employee Evaluation</i>“ form to reflect any changes that were agreed to in the performance review meeting, documenting (if any) areas where a mutual consensus could not be reached and the reasons why.</li> <li><input type="checkbox"/> Once the final version of the „Employee Evaluation“ is complete, you will receive an email with a link to view it and provide your “electronic signature.”</li> <li><input type="checkbox"/> When all electronic approvals are in place, the document will be sealed and become part of your personnel file. In cases where there is significant and irreconcilable disagreement, an employee may launch an appeal through HR.</li> <li><input type="checkbox"/> HR will capture certain data (on training/development needs, career interests, strengths and skills as well as areas or ideas for improvement, your feedback on management needs, etc.) to generate reports for Executive Directors and Deans to enhance business functions and operations.</li> <li><input type="checkbox"/> You and your supervisor should exchange ongoing feedback about performance goals and standards throughout the year. Keeping many detailed notes will help you prepare for the next review.</li> </ul> |   |